



Using nFORM Operational Reports

Data Capacity and CQI TTA Team

July 14, 2026





Presenters



Hannah McInerney

Data Capacity and CQI
TTA Team Lead



Scott Baumgartner

Data Capacity and CQI
TTA Team Member



Housekeeping

Please mute your line

Access closed-captioning by clicking the “CC” icon in the lower left corner, or by pressing CTRL+SHIFT+A

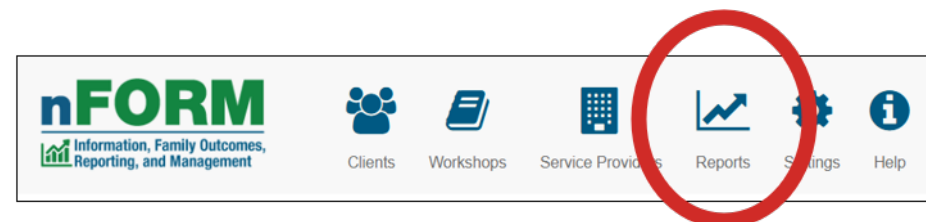
Use the chat to ask questions

Recording and slides from today’s office hours will be made available on the HMRF Grant Resource site at <https://hmrfggrantresources.info/>



Today's agenda

- **Entering data into nFORM**
- **Overview of operational reports**
- **Questions and answers**





| Entering data into nFORM



Initial site administrators received email on July 13th to activate their accounts

Site administrators complete nFORM setup activities including...

Creating
additional user
accounts

Adding grant
locations

Entering service
providers

Setting up
workshops

All users should watch Keeping Data Secure and Well nFORMed training videos, and review the nFORM User Manual available on the [HMRF Grant Resource site](#) before accessing nFORM



Kicking off nFORM data collection



Grants that are fully implementing should begin using nFORM to

- Create client applications
- Administer surveys
- Record service delivery information

Enter information only for clients who are not yet enrolled

PDFs of surveys on resource site for reference and paper administration



nFORM/CQI RESOURCESINTERACTIVE SNAPSHOTS

Refine results

Contains any of these words ▼
Enter a search item

APPLYRESET

Type ▼

- Tip Sheets (13)
- Training Videos (8)
- Surveys (5)
- Template/Tool (4)
- Detailed Instructions (2)
- Data Dictionary (1)

Topic ▼

- Communicate and act on results (3)
- Conduct road test and assess implementation (5)
- Data collection (3)
- Data dictionary (1)
- Data security (3)
- Enrollment (1)
- General CQI (4)
- Grant locations (1)
- Identify area to improve/set a goal

Sort by Newest ▼

APPLYRESET

Displaying 1 - 10 of 33

Program Operations Survey

This is a PDF version of the Program Operations Survey, which is submitted by site administrators as part of the process for completing the PPR.

Survey coming soon

Jun 2026

RF Community Fathers Entrance/Exit Surveys

These are PDFs of the Entrance and Exit surveys completed by RF Community Fathers.

Surveys coming soon

Jun 2026

HM Youth Entrance/Exit Surveys

These are PDFs of the Entrance and Exit surveys completed by HM Youth.

Surveys coming soon

Jun 2026

RF Reentering Fathers Entrance/Exit Surveys

These are PDFs of the Entrance and Exit surveys completed by RF Reentering Fathers.

Surveys coming soon

Jun 2026

HM Adults Entrance/Exit Surveys

These are PDFs of the Entrance and Exit surveys completed by HM Adults, including both HM Adult Individuals and



Grant year and academic year calendars

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep

Academic Year Calendar

Grant Year Calendar

READY4Life grants can measure progress on both calendars using nFORM data tools

For example, programs serving youth in schools may enroll clients at the start of the academic year (between July 1 – September 29)

- Enrollment period aligns with last quarter of grant year
- Workshops and individual services provided in first quarter of next grant year

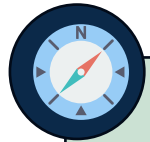
We will discuss this in more detail during upcoming office hours on annual performance progress reports (PPRs)



| Overview of operational reports



Operational reports include real-time nFORM data to help grant staff...



Manage daily HMRF program operations



Monitor CQI strategies



Provide contextual information for PPR progress narratives



Clients



Workshops



Service Providers



Reports



Settings



Help

[Progress Report](#)

[Operational Reports](#)

[Query Tool](#)

[Data Export](#)



Operational reports for grant recipients

New and improved detailed reports support outreach, recruitment, and retention efforts

- **Improved!** All reports have standardized meta-data to support interpretation and linking across reports
- **Improved!** Client contact report responds to grants' requests for consolidated contact information on enrolled clients
- **New!** Outreach report includes data on potential applicants from new outreach workflow

Access to reports based on nFORM user account permissions

- See Table VIII.1 in nFORM User Manual

Operational Reports

- 
- [Caseload Summary](#)
 - [Client Status Report Summary](#)
 - [Enrolled Clients' Email and Phone Report](#)
 - [Incentives Report](#)
 - [Individual Service Contacts](#)
 - [Outreach Detail](#)
 - [Primary Workshop Participation Detail Report](#)
 - [Primary Workshop Participation Summary](#)
 - [Series Session Attendance](#)
 - [Survey Completion Summary](#)
 - [Survey Report - Paper Survey](#)
 - [Survey Report - Refused Survey](#)
 - [User Account Activity](#)
 - [Zip Code Report](#)



15 operational reports provide insight into different aspects of operations

Staff info

User account activity

Caseload

Client info

Outreach

Enrolled clients' email and phone

Zip code

Client status

Survey administration

Survey completion

Survey report – paper survey

Survey report – refused survey

Enrollment and participation

Individual service contacts

Incentives

Series session attendance

Primary workshop participation (summary)

Primary workshop participation (detail)

Local evaluation enrollment (if applicable)



Site administrators only



Site administrators and case managers only



Using operational reports



Set filters to explore data...

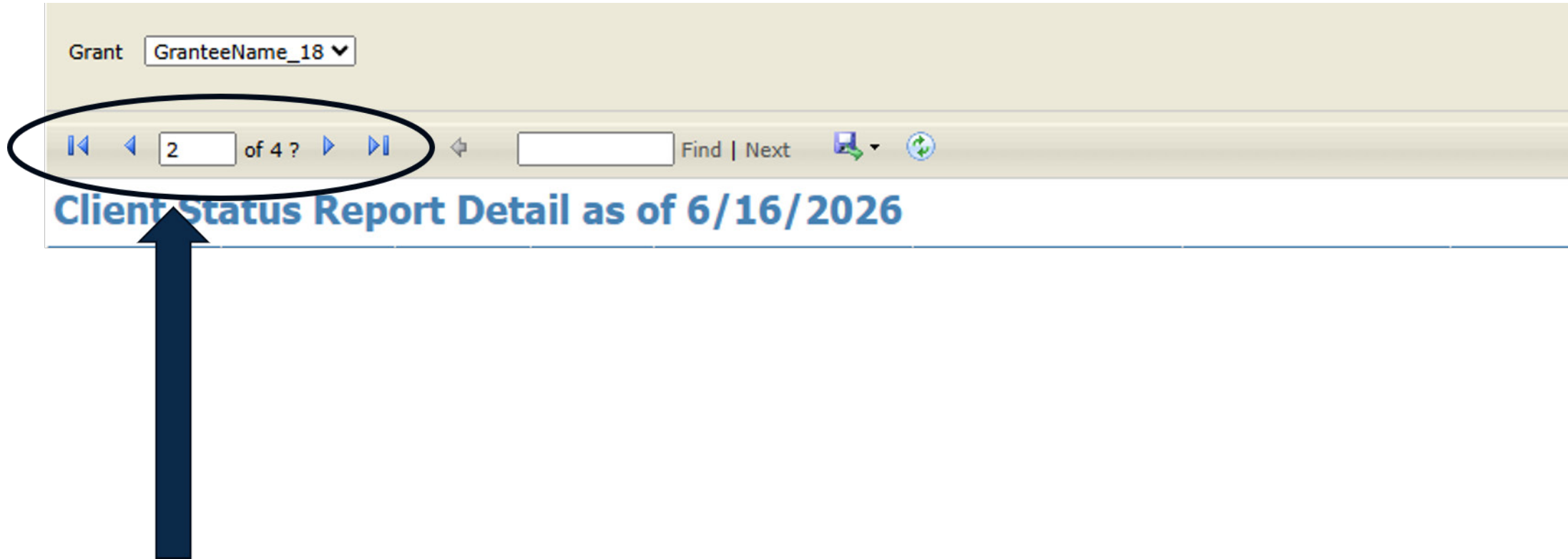
Grant	GranteeName_4	Grant Location	All Locations	View Report
Start Date	9/30/2026  ☐ NULL	End Date	12/31/2026  ☐ NULL	



**...then click the “View Report” button
in the upper right hand corner**



Navigate tabs and pages using the arrows





**Download
to Excel or
another
format for
analysis**

Grant: Workshop:

Series: StartDate:

EndDate:

1 of 1 Find | Next

Grant: GranteeName_18
Workshop: VW_TestWorkshop_1
Series: VW Workshop
Registration Required: No
Start Date: 04/24/2026 End Date: 05/07/2026
Meeting Day(s): Mon, Tue, Wed, Thur, Fri
Total Workshop Hours: 10
Delivery Mode: In-person
Primary Setting: Community
Scheduled Location: Some Location
Facilitators: D. Duck

Word
Excel
PowerPoint
PDF
TIFF file
MHTML (web archive)
CSV (comma delimited)
XML file with report data
Data Feed



Tips for using operational reports

Review headings and footnotes to identify the types of data included and excluded from a report

Delete client names and other PII if not needed

If **comparing data across reports**, consider the time the report was generated and any filters applied

Use nFORM-generated IDs to link data across operational reports





Staff information



User account activity (site administrators only)

Check to make sure that staff have the right permissions

See whether staff are using nFORM regularly...

Authorization(s) by Active User

Grant Name	Staff Location	User Last Name	User First Name	User Type	User Name (email)	Permissions					Date of		# Days since Last Login Activity	User Account Status
						Enrollment	Case Manager Assignment	Service Provider Management	Sessions Series Management	Query Tool	Account Creation	Last Login		
GranteeName_66	SiteName_13	LastName_1324	FirstName_1324	Site Administrator	user1324@masked.com	x	x	x	x	x	7/26/2021	6/16/2026	0	Active
GranteeName_66	SiteName_13	LastName_1342	FirstName_1342	Case Manager	user1342@masked.com	x	x	x	x		8/2/2021	8/24/2022	1392	Locked
GranteeName_66	SiteName_13	LastName_1343	FirstName_1343	Site Administrator	user1343@masked.com	x	x	x	x		8/2/2021	9/23/2022	1362	Locked
GranteeName_66	SiteName_13	LastName_1481	FirstName_1481	Case Manager	user1481@masked.com	x	x	x	x		9/23/2021	11/6/2023	953	Locked
GranteeName_66	SiteName_13	LastName_1483	FirstName_1483	Site Administrator	user1483@masked.com	x	x	x	x	x	9/23/2021	2/13/2026	123	Inactive
GranteeName_66	SiteName_13	LastName_168	FirstName_168	Site Administrator	user168@masked.com	x	x	x	x	x	3/22/2021	3/2/2026	106	Inactive
GranteeName_66	SiteName_13	LastName_1823	FirstName_1823	Case Manager	user1823@masked.com	x	x	x	x		4/4/2022	4/23/2023	1150	Locked

...or whether their accounts are inactive or locked (which happens automatically after 60 and 90 days of inactivity)



The **summary report** shows the caseload size for each case manager

Sort by the number of active clients to identify how many clients have not been assigned case managers and who has bandwidth to take on new clients



Grant	Staff Location	Case Management Staff	Staff User Account Type	User Account Active?	Number of Active clients	Total number of clients
GranteeName_66		Unassigned	N/A	N/A	13	98
GranteeName_66	SiteName_13	LastName_1324, FirstName_1324	Site Administrator	Y	3	5
GranteeName_66	SiteName_13	LastName_1483, FirstName_1483	Site Administrator	N	0	1
GranteeName_66	SiteName_13	LastName_168, FirstName_168	Site Administrator	N	0	1
GranteeName_66	SiteName_13	LastName_2840, FirstName_2840	Case Manager	N	0	1
		Average Caseload			3.0	



Caseload detail (site administrators and case managers only)

In the **detail report**, case managers can view their assigned applicants and clients

Sort by case management staff to see a specific caseload

Sort by client status to quickly review details about new clients

Review recent activity to identify who needs follow-up

Caseload Detail as of: 6/16/2026

Staff Location	Case Management Staff	Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Enrollment Date	Service Assignment Name (If applicable)	Primary Language	Application Form Completed by	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided
	Unassigned	SiteName_13	Community father	12478141		AprilLast271	AprilFirst271	Applicant pending enrollment			English	LastName_168, FirstName_168				
	Unassigned	SiteName_15	Reentering father	12471478		Australia	Omar	Will not enroll			English	LastName_1342, FirstName_1342	3/23/2026			



Client information



Outreach detail (site administrators, case managers, general users with permission)

Grant: HEART Grant 301
Start Date: 9/30/2025
End Date: 4/16/2026
Exclude Will Not Enroll: ☒ True ☐ False

Can exclude applicants with status "Will Not Enroll" to make it easier to identify who to contact

HEART Grant 301
Outreach Detail Report*
Application Dates 9/30/2025 - 4/16/2026

Client Location	Client Population	Client Last Name	Client First Name	Client Status	Client Status Change Date	Application Date	Application Form Completed By	Client's Case Manager(s)	Primary Language	Email	Home Phone	Cell Phone	Work Phone	Most Recent Service Contact Date	Total Number of Substantive Service Contacts	Total Number of Informational Service Contacts	Total Number of Reminder Only Service Contacts	Total Number of Referrals
	Adult couple	Flintstone	Fred	Applicant pending enrollment	2/18/2026	2/18/2026	SiteAdmin2, HEART301		English	fflintstone@email.com	315-666-4551							
	Adult couple	Flintstone	Wilma	Applicant pending enrollment	2/18/2026	2/18/2026	SiteAdmin2, HEART301		English		315-222-1551							
	Adult couple	Munster	Herman	Outreach	2/18/2026	2/18/2026	SiteAdmin3, HEART301		English		215-555-1212							
	Adult couple	Munster	Lily	Outreach	2/18/2026	2/18/2026	SiteAdmin3, HEART301		English			212-555-1212						
	Adult couple	Rubble	Barney	Outreach	2/18/2026	2/18/2026	SiteAdmin1, HEART301		English		212-555-1212			2/18/2026		1		
	Adult couple	Rubble	Betty	Outreach	2/18/2026	2/18/2026	SiteAdmin1, HEART301		English			212-555-4646						
New Location	Adult couple	Gump	Forrest	Applicant pending enrollment	4/13/2026	4/13/2026	SiteAdmin1, HEART301	HEART301 SiteAdmin1	English			555-887-5536		4/13/2026		1		1
New Location	Adult couple	Gump	Jenny	Applicant pending enrollment	4/15/2026	4/15/2026	SiteAdmin1, HEART301	HEART301 CaseManager; HEART301 CaseManager; HEART301 CaseManager; HEART301 SiteAdmin1; HEART301 SiteAdmin2; HEART301 SiteAdmin3	English			555-754-5555						
New Location	Adult couple	Rascale1	Rocky1	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin2, HEART301		Tagalog	Moonstruck301@cosmo.net	445-445-5455		301-574-5274					
New Location	Adult couple	Rascale1A	Raquel1	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin3, HEART301		English		454-455-5555							
New Location	Adult couple	Smith	Jenny	Applicant pending enrollment	4/13/2026	4/13/2026	SiteAdmin1, HEART301	HEART301 SiteAdmin1						4/13/2026		1		1
New Location	Adult individual	5142	TP1	Applicant pending enrollment	4/15/2026	4/15/2026	SiteAdmin1, HEART301		English			141-241-2414						
New Location	Adult individual	Brown	Charlie	Applicant pending enrollment	3/5/2026	3/5/2026	SiteAdmin2, HEART301		English		212-555-1212							
New Location	Adult individual	Thropp	Elphaba	Outreach	2/23/2026	2/23/2026	SiteAdmin1, HEART301		English	elphie123@google.com								

Check service contacts and referrals for applicants

Check which staff completed each application and any assigned case managers to plan next steps

Sort by Client Status to see how many applicants are in Outreach status, and how many are pending enrollment



Email and phone (site administrators, case managers, general users with permission)

Grant: Start Date:

End Date: Client Status:

Workshop: Series:

1 of 1 Find | Next

Filter by enrollment date, client status, workshop, or series to quickly get contact information for groups of clients

ENROLLED CLIENTS' EMAIL and PHONE REPORT

Grant: GranteeName_4

Clients Enrolled: 4/1/2026 - 6/16/2026

Client Status: All Client Statuses

Sort by case manager to identify clients who need to be assigned a case manager

Client Location	Client Population	Client Last Name	Client First Name	Client Status	Enrollment Date	Service Assignment Name	Client's Case Manager(s)	Primary Language	Email	Home Phone	Cell Phone	Work Phone
	Community father	Costanza	George	Active	4/3/2026			English			212-777-5454	
	Community father	Soprano	Tony	Active	4/3/2026			English			718-555-1212	
SiteName_304	Community father	Rabbit	Mister	Active	6/2/2026		FirstName_2009 LastName_2009	English				
SiteName_927	Community father	Treacher	Arthur	Active	5/29/2026			English			212-555-1212	

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.

6/16/2026 4:04:28 PM



| Zip code (site administrators, case managers, general users with permission)

Reports number of enrolled clients by location, population, and participant zip code so that programs can assess whether they are reaching target geographic areas

Client Location	Client Population	Zip Code	# Clients
SiteName_125	Adult individual	12458	1
SiteName_125	Adult individual	65897	1
SiteName_126	Adult individual	03992	1

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.

Filter by enrollment date, client status, and specific workshops and series

Grant	GranteeName_4 ▾	Start Date	9/1/2026 
End Date	12/1/2026 	Client Status	All Client Statuses ▾
Workshop	Select Workshop ▾	Series	Select all Series ▾



| Client status (site administrators, case managers, general users with permission)

Summary report shows count of clients by status code; use to assess flow from initial outreach through program completion and identify bottlenecks

Grant	Total (excl Duplicates)	Outreach	Will not enroll	Applicant Pending Enrollment	Active	Completed/ Graduated	Primary complete/optional active	Temporary Hold	Non-responsive	Drop out	Moved out of area	Incarcerated	Consent Revoked	Removed from program	Deceased		Duplicate Pending	Duplicate Confirmed
All Grants	34	6	0	3	25	0	0	0	0	0	0	0	0	0	0		2	0
GranteeName_4	34	6	0	3	25	0	0	0	0	0	0	0	0	0	0		2	0

Detail report includes one row for each enrolled client

- Identify specific clients who may require follow up or whose status should be updated
- Sort or filter by fields such as location, status, or case manager
- Outreach and Will not enroll potential applicants are listed on Outreach Detail report

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Enrollment Date	Service Assignment Name (If applicable)	Client's Case Manager(s)	Primary Language	Client Status	Client Status Change Date
	Community father	12477265		Costanza	George	4/3/2026			English	Active	4/3/2026
	Community father	12477427		Day	Spring1				English	Applicant pending enrollment	4/14/2026



Survey administration



Summary report summarizes entrance and exit survey completion by population, including survey language and any refusals

Filter by start date,
workshop, or series



Grant: Start Date:

End Date: Workshop:

Series:

1 of 2 Find | Next

Survey Completion Summary*

Clients Enrolled: 4/1/2026 - 6/16/2026

Grant	Client Population	Number of Clients					
		Entrance Survey			Exit Survey		
		Completed		Refused	Completed		Refused
		English	Spanish		English	Spanish	
GranteeName_4	All	4	0	0	3	0	0
	Community father	4	0	0	3	0	0

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.



Detail report provides client-level information on survey completion

Filter by client and survey status columns to identify completed clients who have not yet taken the exit survey

GranteeName_4
Client Survey Status* as of 6/16/2026

Client Location	Client Population	Client ID*	Couple ID	Client Last Name	Client First Name	Client Status	Application Date	Enrollment Date	Service Assignment Name (If applicable)	Client's Case Manager(s)	Survey Completion					
											Entrance Survey			Exit Survey		
											Survey Submission Date	Survey Status	Language	Survey Submission Date	Survey Status	Language
	Community father	12477252		Soprano	Tony	Active	4/3/2026	4/3/2026			4/3/2026	Completed	English	4/6/2026	Completed	English
	Community father	12477265		Costanza	George	Active	4/3/2026	4/3/2026			4/3/2026	Completed	English	4/7/2026	Completed	English
SiteName_304	Community father	12478662		Rabbit	Mister	Active	6/1/2026	6/2/2026		FirstName_2009 LastName_2009	6/2/2026	Completed	English			
SiteName_927	Community father	12478646		Treacher	Arthur	Active	5/29/2026	5/29/2026			5/29/2026	Completed	English	6/1/2026	Completed	English

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.



Summary reports show the number of entrance and exit surveys completed on paper or refused, by location and population

Review trends in backdating to identify any issues with data entry

GranteeName_4
Paper Survey Report Summary*
Clients Enrolled 4/1/2026 - 7/8/2026

Grant	Client Location	Client Population	Entrance Survey Number of paper surveys completed (by # days backdated)						Exit Survey Number of paper surveys completed (by # days backdated)					
			Total	0	1	2	3	4	Total	0	1	2	3	4
GranteeName_4	All	All	51	37	15	3	1	1	39	31	4	3	1	0
		Community father	36	20	12	2	1	1	25	18	3	3	1	0
		Reentering father	21	17	3	1	0	0	14	13	1	0	0	0



Detail reports provide client-level information

In the **Paper Survey Detail** report, sort by #Days difference to explore data entry trends

GranteeName_18

Paper Survey Report Detail*

Clients Enrolled 4/1/2026 - 6/16/2026

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Application Date	Enrollment Date	Service Assignment Name (If applicable)	Survey	Paper Copy Administration Date	System Entry Date	#Days difference
-----------------	-------------------	-----------	-----------	------------------	-------------------	---------------	------------------	-----------------	---	--------	--------------------------------	-------------------	------------------

In the **Refused Survey Detail** report, review the Reason column to identify trends in refusals

GranteeName_18

Refused Survey Report Detail*

Clients Enrolled 4/1/2026 - 6/16/2026

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Application Date	Enrollment Date	Service Assignment Name (If applicable)	Survey	Date Client Refused Survey	System Entry Date	#Days difference	Reason
SiteName_126	Adult individual	12478387		Tester	IncentivePostEnroll	Active	5/8/2026	5/7/2026		Entrance	5/7/2026	5/8/2026	1	Privacy concerns

*Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked.



Enrollment and participation



Individual service contacts (site administrators and case managers only)

Grant	Client Location	Client Population	Number of Clients/Couples	Average Number of Substantive Service Contacts@	Average Number of Informational Service Contacts	Average Number of Reminder Only Service Contacts
GranteeName_4	All	All	4	0	0.25	0
		Community father	4	0	0.25	0
	Not specified	All	2	0	0	0
		Community father	2	0	0	0
	SiteName_304	All	1	0	1	0
		Community father	1	0	1	0
	SiteName_927	All	1	0	0	0
		Community father	1	0	0	0

The **summary** lists the number of clients who received individual service contacts and average contacts provided by location, population, and type

*This report does not include clients with a client status of "Consent revoked," clients with a "Control (NO Services Provided)" or "Control Waitlist (NO Services Provided)" service assignment, or clients with a case status of "Non program." In addition, couples where only one client is enrolled are excluded from this report.

@Substantive individual service contacts are service contacts that (1) last 15 minutes or longer, (2) result in direct contact with the client, and (3) cover client issues and needs beyond just reminder contacts.

The **detail** lists service contact information for each client

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Enrollment Date	Service Assignment Name (If applicable)	Client's Case Manager(s)	Most Recent Substantive Service Contact Date	Total Number of Substantive Service Contacts@	Total Number of Informational Service Contacts	Total Number of Reminder Only Service Contacts
Not specified	Community father	12477265		Costanza	George	Active	4/3/2026						
Not specified	Community father	12477252		Soprano	Tony	Active	4/3/2026						
SiteName_304	Community father	12478662		Rabbit	Mister	Active	6/2/2026		FirstName_2009 LastName_2009			1	
SiteName_927	Community father	12478646		Treacher	Arthur	Active	5/29/2026						

Sort by most recent date to see who needs to be contacted



The **summary report** lists the number of clients who received incentives by location, population, and type of incentive

Grant	Client Location	Client Population	Number of clients who received any incentive	Number of clients with incentives exceeding \$350 max	Number of clients who received an Enrollment incentive	Number of clients who received a Participation/ Client Milestone incentive	Number of clients who received a Survey Completion incentive
GranteeName_4	All	All	1	0	1	0	0
		Community father	1	0	1	0	0
	Not specified	All	0	0	0	0	0
		Community father	0	0	0	0	0
	SiteName_304	All	1	0	1	0	0
		Community father	1	0	1	0	0
	SiteName_927	All	0	0	0	0	0
		Community father	0	0	0	0	0

NOTE: Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked. Clients with a 'No services' service assignment are included. Clients enrolled as a part of a Couple Population are counted as individuals (i.e. if 1 partner received an incentive and the other partner did not, the incentives count increases by 1. If the couple has received an incentive together, the incentives count increases by 2.) When only one partner of a couple is enrolled, the enrolled partner's incentives are included on this report. A client may be counted in more than one incentive category column. Therefore, the sum of the counts in the incentive category columns may not equal the count in the "any incentive" column. However, none of the individual category columns should exceed the amount in the "any incentive" column.



Incentives detail (site administrators and case managers only)

The **detail** report provides specific dollar amounts received by each client

Sort/filter by total incentives to make sure clients have not exceeded \$350 max

Sort/filter by incentive type to check whether participants have received incentives as planned

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Enrollment Date	Service Assignment Name (If applicable)	Client's Case Manager(s)	Total Incentives	Enrollment	Participation/Client Milestone	Survey Completion
	Community father	12477265		Costanza	George	Active	4/3/2026			\$0.00	\$0.00	\$0.00	\$0.00
	Community father	12477252		Soprano	Tony	Active	4/3/2026			\$0.00	\$0.00	\$0.00	\$0.00
SiteName_304	Community father	12478662		Rabbit	Mister	Active	6/2/2026		FirstName_2009 LastName_2009	\$20.00	\$20.00	\$0.00	\$0.00
SiteName_927	Community father	12478646		Treacher	Arthur	Active	5/29/2026			\$0.00	\$0.00	\$0.00	\$0.00

NOTE: Includes ONLY clients who completed enrollment and whose client status is NOT Duplicate confirmed, Duplicate pending, or Consent revoked. Clients with a 'No services' service assignment are included. For clients enrolled as part of a Couple Population, when an incentive is recorded for the couple (to share), one half the dollar amount of the incentive is attributed to each partner. When only one partner of a couple is enrolled, the enrolled partner's incentives are included on this report.



Series session attendance (site administrators, case managers, general users with permission)

Grant Workshop

Series StartDate

EndDate

Filter by workshop and series to generate report

See which session(s) a client missed or whether attendance for sessions needs to be entered

												Attendance by session (session name, duration, date)			
									Number of Sessions *						
Client ID	Couple ID	Client	Client Location	Client Population	Enrollment Date	Service Assignment Name (If applicable)	Registration Date	Disenrollment Date	Attended	Missed	Made up	03/30/2026	03/31/2026	04/01/2026	04/02/2026
															Not Recorded
66914327		Osbourne, Ozzy	Sitename132	Community Father	3/28/2026		3/29/2026		2	1	0	Yes	Yes	No	
66914314		Mars, Bruno	Sitename132	Community Father	3/15/2026		3/29/2026		0	3	0	No	No	No	
66914329		Jagger, Mick	Sitename132	Community Father	3/27/2026		3/29/2026		3	0	0	Yes	Yes	Yes	

7/13/2026 4:36:16 PM

* Missed and Made up sessions appear only when the client was registered in advance for the session

Sort by "missed sessions" to identify clients who need to make up sessions they registered for



Primary workshop participation summary (site administrators, case managers, general users with permission) (1)

The **summary report** provides the number of clients enrolled at each location, their average participation hours, and average progress towards target participation in the primary workshop

Grant	Client Population	Client Location	Number of Clients	Average Participation in Primary Workshop(s) (Hours)	Target for Participation in Primary Workshop(s) Hours	Average % of Target Participation (in Primary Workshop(s)) Achieved
GranteeName_4	Community father		3	0.0	26.0	0.0%
		SiteName_1043	2	0.0	26.0	0.0%
		SiteName_304	1	0.0	26.0	0.0%
		SiteName_359	2	3.0	26.0	11.5%



Primary workshop participation detail (site administrators, case managers, general users with permission) (2)

The **detail report** provides client-level data on participation

Filter by location and start/end dates to narrow in on specific clients

Sort by most recent session date attended to identify clients who need follow-up

Sort by participation in primary workshop hours to identify each client's progress

Grant

GranteeName_4

Grant Location

All Locations

Start Date

☒ NULL

End Date

6/16/2026

☐ NULL

1 of 1

Find | Next

GranteeName_4

Participation in Primary Workshop(s)* - Detail Report

Client Location	Client Population	Client ID	Couple ID	Client Last Name	Client First Name	Client Status	Enrollment Date	Entrance Survey Completion Date	Service Assignment Name (If applicable)	Most Recent Primary Workshop Session Attended Date	Exit Survey Completion Date	Participation in Primary Workshop(s) Hours	Target for Participation in Primary Workshop(s) Hours	% of Participation in Primary Workshop(s)
	Community father	12477032		Lepew	Pepe	Active	3/31/2026	3/31/2026				0.0	26.0	0.0%
	Community father	12477252		Soprano	Tony	Active	4/3/2026	4/3/2026			4/6/2026	0.0	26.0	0.0%
	Community father	12477265		Costanza	George	Active	4/3/2026	4/3/2026			4/7/2026	0.0	26.0	0.0%



| Questions?





Wrap up

Review [nFORM user manual](#) module VIII for more information on data tools

All nFORM and CQI resources on HMRF Grant Resource site at <https://hmrfgrantresources.info/>

Submit your data capacity and CQI plan if you haven't already

Data security reminders

- Never text or email personally identifiable information (PII) like client names – including to the help desk
- Never take screenshots of client PII from nFORM
- Everyone who interacts with client data should watch the [Keeping Data Secure training video](#) and review **Module I of the nFORM user manual**

After reviewing resources, contact the data capacity and CQI TTA help desk with any questions at nFORMCQITA@mathematica-mpr.com